San Bernardino County

Behavioral Health

County of San Bernardino

Objective Arts (OA) Training Manual

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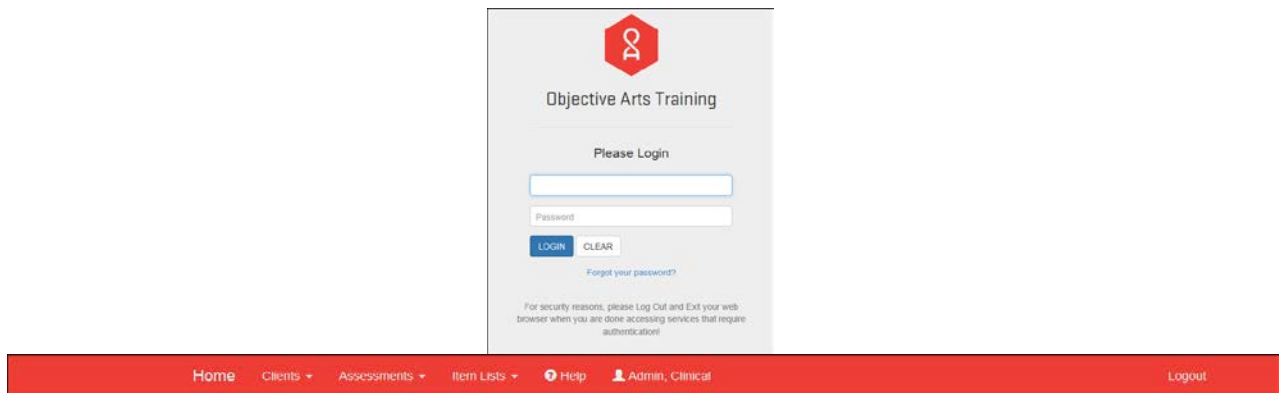# Important Notes

This document is dynamic; as changes are made new versions will be posted to the website. Please check back periodically for updates.

If you are using this manual to learn or practice using the Objective Arts (OA) database, please be sure that you are logged into the OA Training site.

- o The color to identify the OA Training Site is Dark Orange.

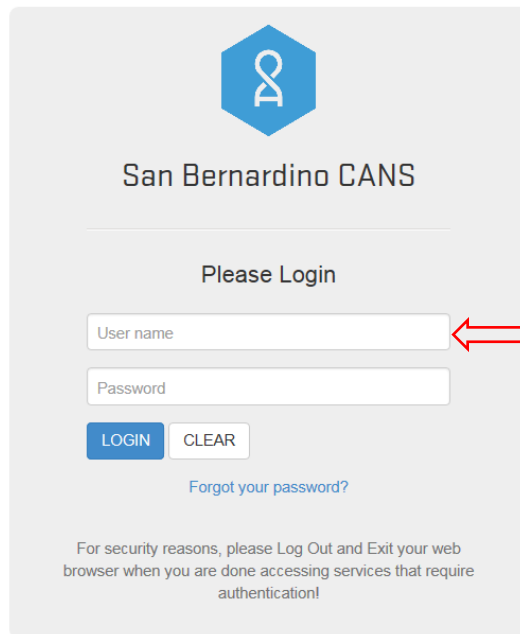- o The color to identify the OA Production (live) Site is Blue.
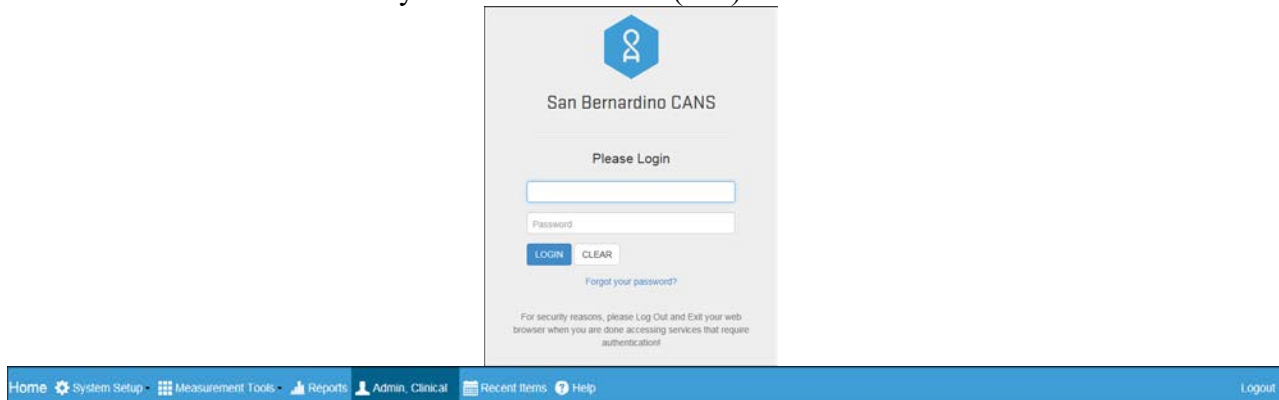
Objective Arts website addresses:

- o Training: https://training-sbcans.oasmr.com.
- o Production: https://sbcans.oasmr.com.

- Screen shots in the document will be from the Production site as often as possible so that you can get familiar with the site's look; however, to safeguard client information, some screen shots will be from our training sites.

Logging in to Objective Arts

1. **Log on to Objective Arts at: https://sbcans.oasmr.com**
   - Your user name is your SIMON number for staff who bill in the DBH billing systems, your County employee number for County staff who do not bill in the county billing system, or for staff of DBH contracted agencies who do not bill in the DBH billing system, your login should be created to conform to the following naming convention (FirstInitialMiddleInitialLastName_RU (e.g., Donald D. Duck working in RU 36XXYY: DDDuck_36XXYY).
   - You will be supplied with a password from your program's designated Objective Arts (OA) Subject Matter Expert (SME).
     - Subject Matter Experts (SME) are ***technical experts*** in the Objective Arts program, for the agency.

2. **Passwords are case sensitive. Enter the password exactly as it was given to you.**

For clinical staff, your user name will **always** be your SIMON #

- Your User name is your SIMON number or the User name supplied by your SME.
- The email entered must match exactly how it is entered in Objective Arts (case sensitive).

After logging in, the following screen appears. This screen is referred to as the **Home Screen**. The options shown on this screen will depend on your role in Objective Arts.
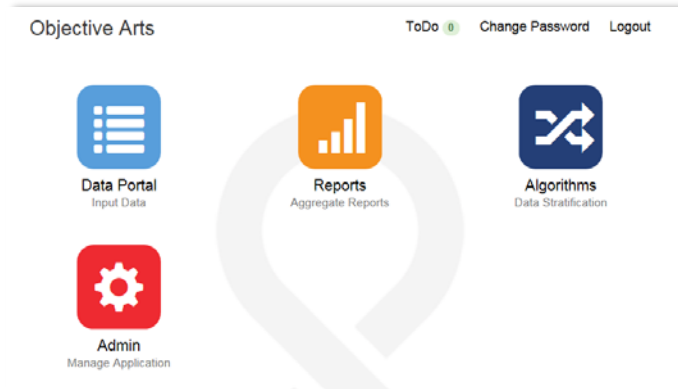
Changing your Password

The first time you log in best practices direct you to change your password, but you will not be prompted to do so. To change your password, you will need to be at the **Home screen**.

1. **Click on the Change Password link at the top right of the page.**
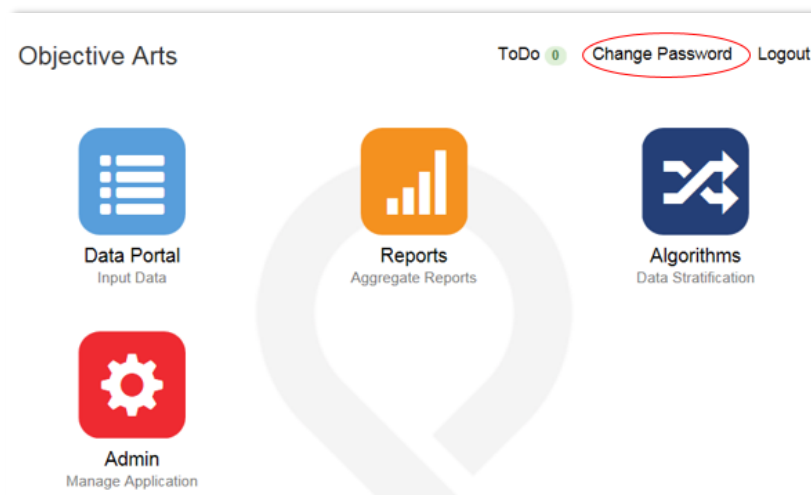
2. **Enter your old password.**

3. **Next enter your new password**
   - Passwords must be at least seven characters in length, include at least one number and one capital letter.
   - Repeat the new password.

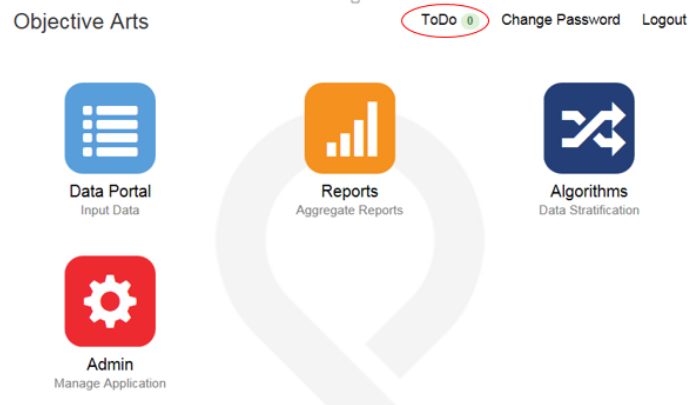4. **Click Save.**

5. Forgot your password - Request Password Reset

To Do List

1. **From the Home screen, click ToDo.**

- This screen functions as your OA inbox of notifications; making you aware of the assessments that are incomplete, upcoming, overdue, returned or pending approval (if you are a clinical supervisor).


✓ **Initial Upcoming:** Lists the Initial assessments due within 30 days.
✓ **Initial Overdue:** Lists the Initial assessments that are overdue.
✓ **Update Upcoming:** Lists the Update assessments due within 30 days.
✓ **Update Overdue:** Lists the assessments 90 days or more overdue.

✓ **Discharge Overdue:** Lists the outstanding discharge assessments for which you, in the OA Clinical Staff role, are responsible. If you are in the OA role of Supervisor or above, you will see the outstanding discharge assessments for all of the Clinical Staff in the RU(s) for which you are responsible.
✓ **Returned:** Lists the assessments returned to the Clinical Staff by the Supervisor.
✓ **Pending Approval:** For OA roles of Supervisor and above; lists the assessments submitted by Clinical staff, awaiting approval.

2. **Click on a client description (Desc) and the assessment will open. You will then be able to create, edit, submit, or approve the assessment.**

Data Portal

1. **From the Home screen, click Data Portal.**
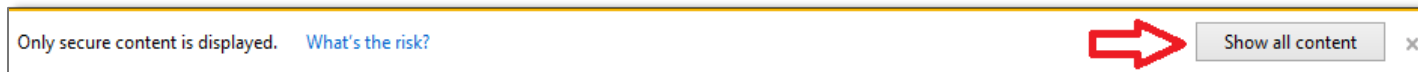

Data Portal
Input Data
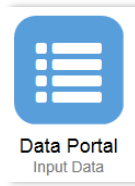
After clicking on Data Portal, you will see the following:
Please Note: In the actual Production site the menu bar will be blue. While we will try to present screen shots from the Production site for familiarity of the site, in order to show only de-identified information in this training manual, at times the menu bars will show as orange or red, as they appear in the training site.

Depending on your browser settings, you may see a security bar at the bottom of the screen that states, "Only secure content is displayed." If so, and you are working on a non-public computer, click "Show all content".

The Data Portal Toolbar

- ✔ **Home:** allows you to return to the Home screen.
- ✔ **Clients:** this drop-down menu offers a choice between viewing a Clients List and viewing client workload.
- ✔ **Assessments:** this drop-down menu is the way to navigate to a list of client assessments or to view assessments in need of approval.
- ✔ **Help:** the help button will open the Objective Arts Wiki on a new tab.
- ✔ **Logout:** after having entered the desired data, end the session by clicking this link on the top right of the screen. In addition, close your browser after your OA session.

Clients

Clients List

This screen is a list of the clients who have an active placement in the RU(s) assigned to you in OA (the list will likely include more clients than your individual workload). This list may be sorted by three categories: Identifier (Simon number), Name (last, first), or Date of birth.
*Please note: Clients are added to OA via automated SIMON batch upload (takes 1-2 business days).*

	Identifier ↓↑	Name ↓ᵃ	Date of birth ↓↑
☐		null, null	May 23, 2005
☐		null, null	December 4, 1996
☐	1000015	Last1000015, First1000015	November 12, 1996
☐	1000260	Last1000260, First1000260	December 18, 1994

1. **To sort the information, click on the category (or arrow next to it) to arrange the set:**
   - By default, the list is sorted by Name (alphabetically A-Z)
   - Identifier (from lowest to highest OR highest to lowest).
   - Name (alphabetically A-Z or Z-A).
   - Date of birth (oldest to youngest OR youngest to oldest).

Filtering the Clients List

1. **On the top grey bar, to the right, in your "Clients List" window, you will see the following:**
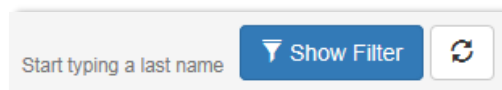
2. **If you begin typing a last name the list will automatically narrow to include clients with only the last name you typed.**
   - Press the Esc key on your keyboard to go back to the default Clients List

   Or you can:

3. **Click the blue Show Filter button at the top right of the screen.**
   The filter section will open and you can narrow the Clients List by entering any of the information requested:

Please note: It is NOT necessary to enter information in all of the search boxes. You may enter as much or as little information as you wish to narrow the list. Once filtered, the "Show Filter" button turns green.

- ✔ **Identifier:** to locate client if you know the client's Identifier (SIMON Number). Partial Information may be used.
- ✔ **Date of Birth:** to locate client with a specific date of birth (e.g. 03/14/2015)
- ✔ **First Name:** to locate clients by first name. Partial information may be used.
- ✔ **Last Name:** to locate clients by last name. Partial information may be used.
- ✔ **Active Only:** This box is checked by default and only returns clients who are active to the RU(s) you are placed in, in OA. Unchecking this box will return a list of clients active and inactive who are or were placed in your RU(s).
- ✔ **Placement Status:** to filter by clients open to others or closed. Default is "Placed - open to me".
- ✔ **Reporting Unit:** to locate clients by one or more reporting units (RUs) assigned to you in OA (this is only useful if you have more than one RU assigned to you). To Filter by RU: Click the magnifying glass. The plus/minus icons allow you to expand or collapse the list. Click the RU you want to filter by and drag it to the empty white box to the right of the RU list. When this box turns green, "drop" the RU selection into the box, click Apply. You can drag more than one RU into this box. An RU can be deleted from this box by clicking the "X" to the right of the RU.
- ✔ **Tags:** Tags are not in use at this time.
- ✔ **AssessorID:** Opens the Assessor List where you can filter for assessor.

4. **Once you have entered parameters, click Filter, or press the Enter key on your keyboard and your Clients List will now be narrowed by your filter selection(s).**

Additional key information about the filter function:

✓ You will know whether a filter is operating based on the color of the filter button. When the Clients List has been filtered, the Show Filter button will be Green (Blue = list not filtered; Green = list filtered).

✓ To edit a filter, re-open the filter section and change the parameters. Click the blue Filter button on the bottom right to apply the new filter criteria to your data.

✓ The Clear button (to the immediate left of the Filter button) removes all of the filters and returns your list back to the default settings.
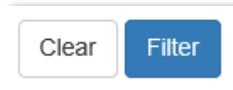
✓ The refresh button in the upper right corner (immediately right of the Hide Filter button) adds to your list any new data that may have uploaded to the system since your last search with similar parameters.
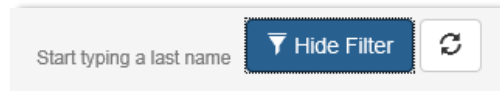
✓ For the identifier, first name, and last name search boxes, entries do not need to be complete ID numbers or words. For example, a search can run using only the first three numbers in a client ID (e.g., "012") to yield a list of clients with the numbers "012" somewhere in the client ID.

Viewing the Workload

Your workload is automatically populated based on the Primary Therapist field in Simon.
However, should you need to add a client to your workload:

1. **To view your workload click Clients on the top menu bar, and then Workload from the drop-down items.**

Adding a Client to the Workload

1. **To add a client to your workload, navigate to the Clients List.**

2. **In the Clients List, check the box(es) next to the Identifier of the client(s) you wish to add to your workload. Click the Add to Workload button at the bottom right of the screen.**

Removing a Client from the Workload

<u>**When the case is closed in Simon, it will be automatically removed from your OA workload.**</u>
However, should you need to manually remove a client from your workload:

1. **Navigate to the Clients List.**

2. **On the toolbar at the top, click Clients and then Workload from the drop-down items.**
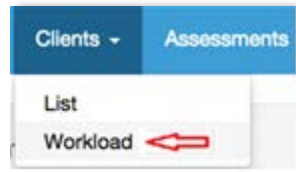
3. **Check the box(es) next to the identifier of the client you are removing and click the red Remove from Workload button at the bottom right of your screen.**

Assessments

Assessment List

1. **From the Home screen, click Data Portal.**
2. **From the Data Portal Toolbar, click the Assessments option from the top Menu Bar and select List from the drop-down menu.**

3. **To sort the information, click on the category (or arrow next to it) to arrange the set by:**
   - ID: The assessment ID.
   - Instrument: the type of assessment. (You may see assessment types other than CANS/ANSA. These assessments are used by specific programs and are not covered in this manual.)
   - Client Name: (alphabetically A-Z or Z-A).
   - Date: by default, the list is sorted newest to oldest.
   - Status: the status of the assessment. (e.g., assigned, submitted or approved).

Adding an Assessment

1. **From the Home screen, click Data Portal.**
2. **Click on the client name for which you would like to create a new assessment. Or filter for the client and then click on the client's name.**
   - You will navigate to the client's assessments screen. This screen may contain assessment information for the client, if there are assessments in OA for the client (see below). If there are no assessments in OA for the client, it will return "No data found!". The assessments may be sorted by ID number, the Instrument, Client Name, Date, and Status.
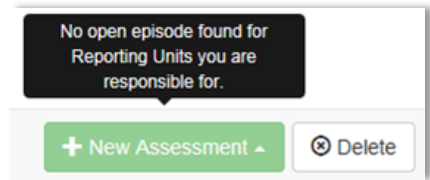
3. **Once on the assessments list, click the green New Assessment button at the bottom right of the screen.**
   - The New Assessment button will not be available for use if the client is not active to your placements, RU(s), in OA. If you hover over the New Assessment button, you will receive the following message:

4. **Upon clicking the New Assessment button, several assessment types will be listed.**
   - Assessment types will display, choose the appropriate assessment.
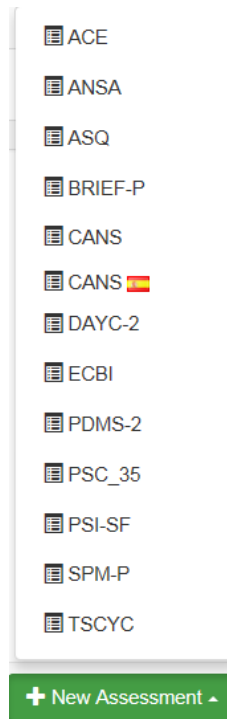
   - As seen above, there are several assessments to choose from. In this section the CANS is used as the example on how to complete an assessment. The skills/practices learned here are similarly applied to all assessments.
   - After selecting the assessment type, the General Information page of the assessment will display. This page includes the Client ID number, Client Name, Date of Birth, and Client Gender.

Be sure that the **Client ID, Date of Birth, Client Name, and Client Gender** are correct for the client that is being assessed.

Assessment ID: The Assessment ID will auto-generate after the assessment is complete and has been saved.

Assessment Date: The assessment date is the date that the assessment was performed, ***not the date that it is entered***. This field defaults to the current date. If the current day's date is not the date of the client's assessment, be sure to change this date to the correct date of assessment.

1. **To edit, click in the Assessment Date field and select the correct date.**

Assessor: This field must reflect the therapist who performed the assessment, *NOT* the person entering the data.

1. **If this field needs to be edited, click on the name that is in the Assessor field. This will open the Edit assessor dialog box.**

2. **The list can be filtered by one or more fields. Click Show Filter and choose from the available options.**

3. **Click on the row listing the assessor's name.**

*Note the change in the assessor name

Rpt Unit: The Reporting Unit will pre-fill if the client is placed and open to only one RU. If the client is placed and open to two or more RUs and the assessor is placed in the same two or more RUs, the Rpt Unit field will be blank. If this field is blank, the correct RU must be selected.

1. **Click in the empty Rpt Unit field.**

2. **Select the correct RU.**

(Important: A reporting unit must be selected in order to save and submit the assessment for approval).

Assessment Data Entry
All fields marked with an asterisk are mandatory and must be completed.

1. **To navigate through the assessment, click on the blue routing buttons with white arrows in the direction you wish to go.**

2. **To complete most fields in the assessment quickly, you can use the Pre-populate feature by clicking the Pre-populate button on the bottom toolbar of your screen.**

- If there are approved assessments in OA for this client, a list of assessments will appear from which you can choose to prepopulate your assessment. *Please note: the approved assessments listed for the client may not be assessments completed by you or for your program. If this is the case, you can dismiss this option by selecting the "x" in the top, right corner.*

Pre-populate Required Fields Only: ☐

Date	Org Unit	Reason	Status
2017-06-27	Mesa Counseling Services	Update	Approved
2017-06-30	Mesa Counseling Services	Planned Discharge	Approved
2016-05-03	Mesa Counseling Services	Initial	Approved
2016-12-02	Mesa Counseling Services	Update	Approved

3. **You also have the option to toggle "Quick data entry mode". This option button is located at the bottom left of each screen:**

Quick data entry mode

☰ OFF 👤 Add caregiver section ➕ Pre-populate   ✖ Cancel ⬆ Save

- If you choose to utilize "Quick data entry mode", a screen will appear where each domain and module can be seen on the same page. In this mode, you will tab through the page to complete the assessment fields, instead of navigating through separate screens.

CANS (NEW) - Last1236, First1236

Client ID:	1236	Date of Birth:	July 1, 2000
Client Name:	Last1236, First1236	Client Gender:	FEMALE
Assessment ID:		Assessment Date:	04/13/2015
Assessor:		Assessment Status:	
Org Unit:	JCBHS - Healthy Homes (36D31)		
Tags:	none		

ˇ Assessment Information

| Reason for assessment: * | | Add Note |
| If reason for assessment is "Major Life Event", please specify: | | Add Note |

ˇ Caregiver Section(s)

| 1. Caregiver section(s) does not apply at this time | ☐ | Add Note |

ˇ Life Domain Functioning

2. Family *		Add Note
3. Living Situation *		Add Note
4. Social Functioning *		Add Note
5. Recreational *		Add Note
6. Developmental *		Add Note

4. **Turn off the "Quick data entry mode" by clicking the same button, which will now look like this:**

ON ☰

5. **To continue through the assessment, click the Assessment Information button.**

CANS (NEW) - Last100050, First100050

Client ID:	Id100050	Date of Birth:	August 26, 2012
Client Name:	Last100050, First100050	Client Gender:	MALE
Assessment ID:		Assessment Date:	02/15/2019
Assessor:	Last1760, First1760	Assessment Status:	
Entered by:			
Rpt Unit:	Mariposa (86781)		
Tags:	none		

❮ Vocational (VOC) Module   Assessment Information ❯

Shortcut: "alt+left arrow" or swipe left   Shortcut: "alt+right arrow" or swipe right

6. **Enter a Reason for assessment.**

CANS (NEW) - Abbott, Benjamin

Assessment Information

Reason for assessment: *		Add Note
	Initial	
If reason for assessment is "Major Life Event", please specify:	Update	Add Note
	Planned Discharge	
	Unplanned Discharge	

❮ General Information   Caregiver Section(s) ❯

7. **Click Caregiver Section(s). This section states, "The Caregiver Section(s) does not apply at this time".**

- If you will be **completing caregiver information** for the assessment, leave this box **unchecked**.

Caregiver Section(s)

| 1. Caregiver section(s) does not apply at this time | ☐ | Add Note |

- If you **will not be entering caregiver information** for the assessment, **check this box**. If you do not check this box, caregiver information WILL be required.

Caregiver Section(s)

| 1. Caregiver section(s) does not apply at this time | ☑ | Add Note |

8. **Add caregiver information by clicking the 'Add Caregiver Section' located on the bottom left of the screen. Select 'Add for Primary Caregiver' or 'Add for Non-Primary Caregiver' as appropriate.**
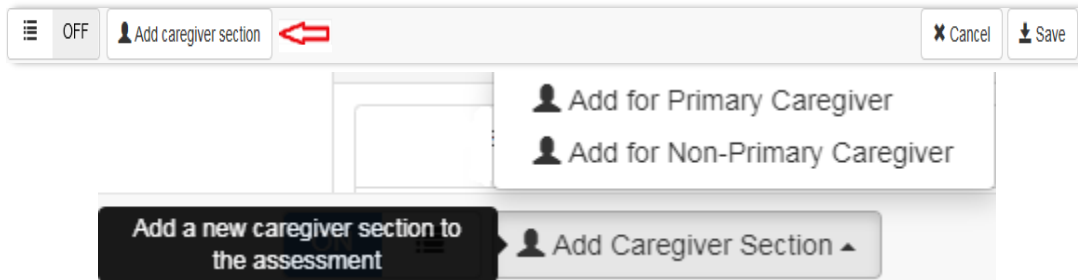
- The Select Caregiver box will pop up. Any caregivers that have been previously entered into OA will show.
- Select the name of the caregiver you are designating as Primary Caregiver or Non-Primary Caregiver. If the caregiver is not on list, press the Edit button at the bottom right to add a new caregiver.
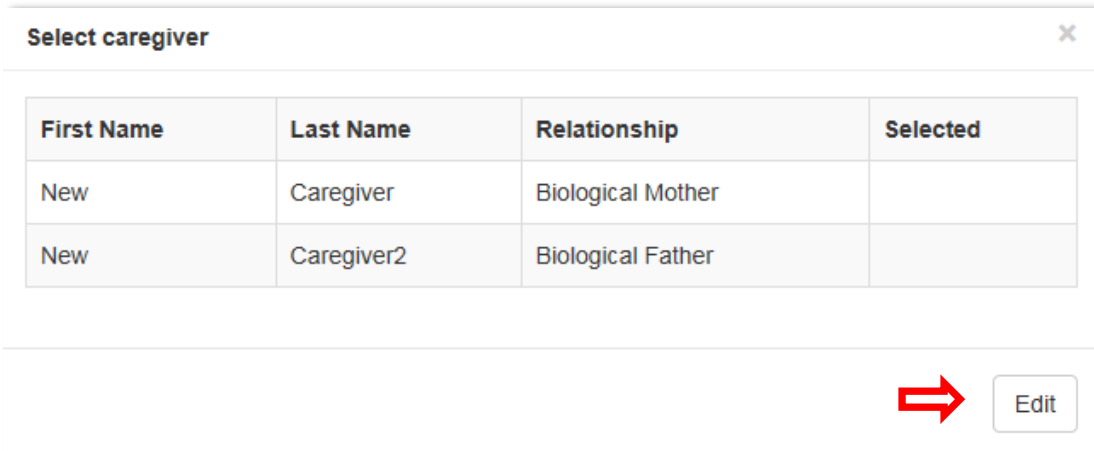
9. **Add a new caregiver to the current list by selecting the Add New option.**
   - If you select Add New, a new row will appear, allowing you to enter the First Name, Last Name, and Relationship of the caregiver (as shown below).
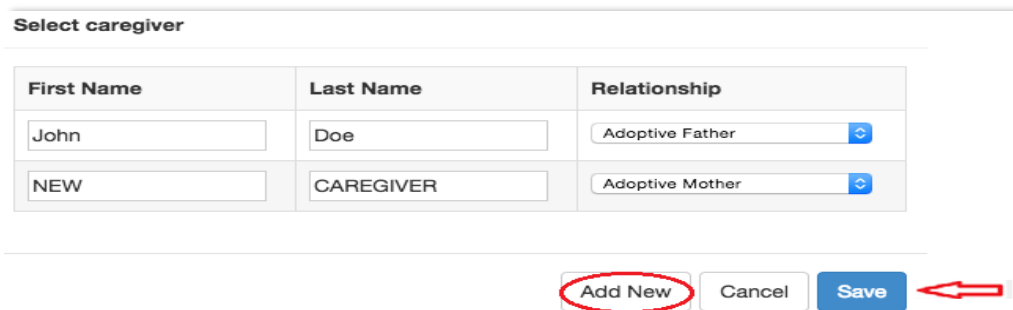
10. **Multiple caregivers can be added. The Save button must be clicked after each caregiver entry before a new caregiver can be added.**
    - You can add as many caregivers as needed by repeating the above process.

11. **If you wish to exit the caregiver screen for any reason, click the "x" at the top, right of the caregiver box, or click anywhere outside of the box.**

12. **Once all caregivers have been added and saved, click the row of the caregiver for which you want to enter assessment scores.**

13. **The assessment Information screen for the selected caregiver will appear.**
    - Select the Caregiver Type from the drop down list.
    - Complete the eleven (11) Caregiver Needs & Strength questions.

- The Primary Caregiver will have a blue background. Non-Primary Caregivers will have a light blue background. Also, a Primary or Non-Primary tag is shown under the caregiver's name
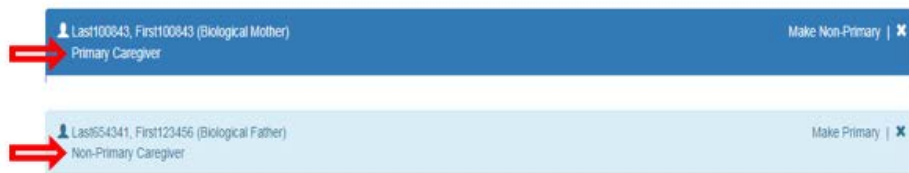
- Select 'Make Primary' to designate a Non-Primary Caregiver as a Primary Caregiver. Select 'Make Non-Primary' to designate a Primary Caregiver as a Non-Primary Caregiver.

14. **To add another caregiver assessment, repeat the steps 8, 12, and 13 from above until you have added information for all of the appropriate caregivers.**

- There isn't any indication that the caregiver section is completed/saved when you enter the information, the next page is the General Information page, where the caregiver button is shown.

| 10. Developmental | 1 | ○ 0 ◉ 1 ○ 2 ○ 3 | Add Note |
| 11. Safety | 1 | ○ 0 ◉ 1 ○ 2 ○ 3 | Add Note |

‹ Fire Setting Module   General Information ›

CANS (NEW) - Test 10, Child

Client ID:	7891233	Date of Birth:	November 9, 2006
Client Name:	Test 10, Child	Client Gender:	MALE
Assessment ID:	119278	Assessment Date:	10/23/2015
Assessor:	Smith, Susie	Assessment Status:	Assigned
Rpt Unit:	CCICMS (36811)		
Tags:	Hispanic Origin (Y) (HOY), ETHA (ETHA), Latino (Latino), English (LANA)		

‹ Test 10, Mrs. (Biological Mother)
Shortcut: "alt+left arrow" or swipe left

Assessment Information ›
Shortcut: "alt+right arrow" or swipe right

15. To complete the assessment, click the General Information Button (shown above).

16. Click the Assessment Information button.

17. Click the Caregiver Section(s) button.

18. Click the Life Domain Functioning button.

CANS (NEW) - Last1236, First1236

Caregiver Section(s)

| 1. Caregiver section(s) does not apply at this time | ☐ | Add Note |

‹ Assessment Information   Life Domain Functioning ›

- A list of 14 items numbered from 2 through 15 will appear
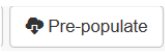
CANS (NEW) - Last2037948, First2037948
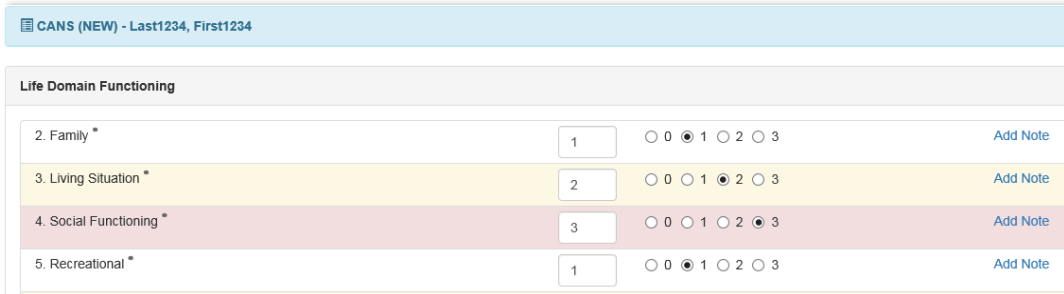
Life Domain Functioning

2. Family *		○ 0 ○ 1 ○ 2 ○ 3	Add Note
3. Living Situation *		○ 0 ○ 1 ○ 2 ○ 3	Add Note
4. Social Functioning *		○ 0 ○ 1 ○ 2 ○ 3	Add Note

There are three options for entering the data:
✓ You can enter numbers 0,1,2,3 in the empty boxes from your keyboard. Press the tab key on your keyboard to move to the next box to be filled.
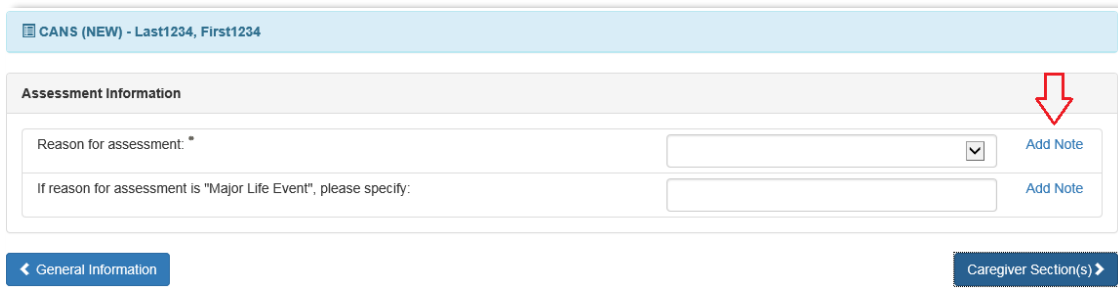
✔ You can select one of the bubbles from the existing options of 0,1,2,3 for each category with the click of the mouse.

✔ You can select Pre-populate scores from a previously approved assessment   ☁ Pre-populate

✔ Notice in the screen shot below that scores requiring action generate background color-coding that matches the severity of the score. (2 = yellow; 3 = red).

📋 CANS (NEW) - Last1234, First1234			
Life Domain Functioning			
2. Family *	1	○ 0 ◉ 1 ○ 2 ○ 3	Add Note
3. Living Situation *	2	○ 0 ○ 1 ◉ 2 ○ 3	Add Note
4. Social Functioning *	3	○ 0 ○ 1 ○ 2 ◉ 3	Add Note
5. Recreational *	1	○ 0 ◉ 1 ○ 2 ○ 3	Add Note
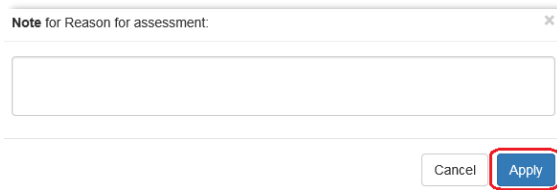
19. **Continue through the assessment completing all required sections and modules by pressing the blue routing buttons.**

20. **If at any time, you would like to add a note to one of the items, click the Add Note button.**

📋 CANS (NEW) - Last1234, First1234		
Assessment Information		
Reason for assessment: *	[▾]	Add Note
If reason for assessment is "Major Life Event", please specify:	[　　　]	Add Note

❮ General Information   Caregiver Section(s) ❯
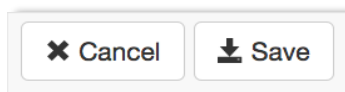
21. **A text box will open. Enter your note.**

Note for Reason for assessment: ✕

[   ]

Cancel   Apply

22. **Click Apply.**

23. **Once you have completed all required domain items and modules, click the Save button located at the bottom right of the screen.**

✖ Cancel   ⬇ Save

Assessment Toolbar

After the assessment has been saved for the first time (and thereafter) you will see a toolbar along the bottom of the screen. The options (buttons) shown below vary depending on your Objective Arts role.

✓ **+/- Icons:** the plus/minus icons on the far left of the bar allow you to expand or collapse the domains and modules in the assessment. Selecting the plus will show each individual domain/module items. Selecting the minus will only show the domain and module headings.

✓ **Filter:** allows you to filter by assessment scores. For example, you can filter to show assessment scores of "2s & 3s" or for "3s only".
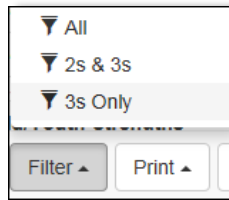
✓ **Print:** The print options (shown below) allow you to print the assessment in various forms. You can print a complete version that is color-coded or black and white that looks like the version shown after an assessment has been saved in OA. The Summary print version is a shortened assessment report that shows only the domain and module names color coded to the match the highest reported assessment score (1 - yellow, 2 - orange, 3 - red). The reports with algorithm scores print options display the count of 2's & 3's of Core Needs Actionable Items. The Print CANS-SB/Print ANSA-SB are the most used options and, for most agencies are the print versions kept in client charts. *Please note: each document will open in a new window of your browser.*
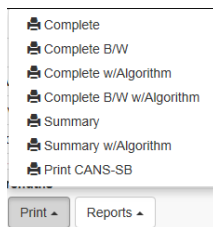
✓ **Reports:** The Compare Previous in OU report is a report that compares the current assessment with any previous assessment scores in the RU for the client. The Actionable Items report shows only those items with scores of 2 or 3. The Algorithm Scores show a summary of the Actionable Items scores. *Please note: each report will open in a new window of your browser.*
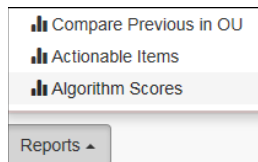
✓ **Recall:** The Recall button allows you to recall an assessment prior to its approval.
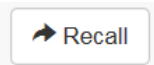
✓ **Submit:** The Submit option allows you to submit the assessment for review and approval of a supervisor. If successful, you will see a confirmation that says that the assessment was successfully submitted. If not, you will receive validation errors.

➤ Submit   ✓ Assessment successfully submitted.   ✕
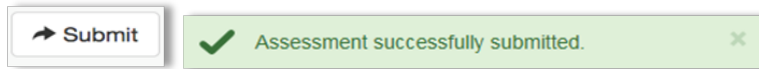
✓ **Submit and Approve: !!Assessors are not allowed to approve their own assessments!!**

✓ **Edit:** the Edit option allows you to change information in the assessment.

✓ **Delete:** the Delete option allows for the deletion of an assessment. Delete ability depends on your Objective Arts role. For example, only a Domain Clinical Administrator can delete a CANS/ANSA assessment that has already been approved in the system.

Side Panel

1. To open the side panel click the arrow to the left side of the screen.
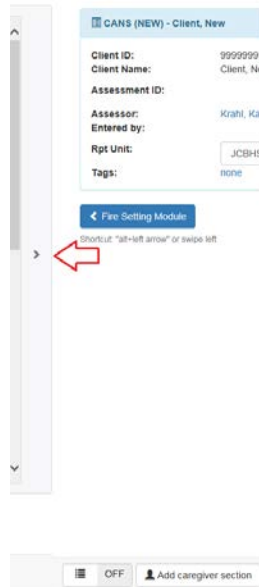
The purpose of this side panel is two-fold:
It allows you to advance to the assessment domain or module of your choice.
It provides a summary level, color-coded view (by actionable scores) of the domains and modules.

This example is of the panel when no scores in any of the assessment's sections have been entered.
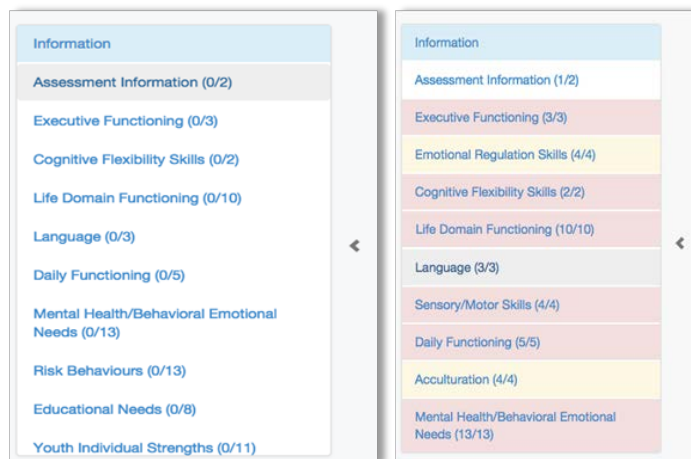
This example is of the panel once assessment scores have been entered.

2. Once you are satisfied that your assessment is complete, click Submit to send the assessment to your supervisor for approval.

Validation Errors

1. **Assessments submitted with missing or required information will receive a validation error dialogue box.**
    - This is designed to ensure that all parts of the assessment are complete before submission.
    - The box, entitled Validation Errors, will list all of the items in the CANS-SB/ANSA-SB (giving the item name, question number or full question) that must be completed.
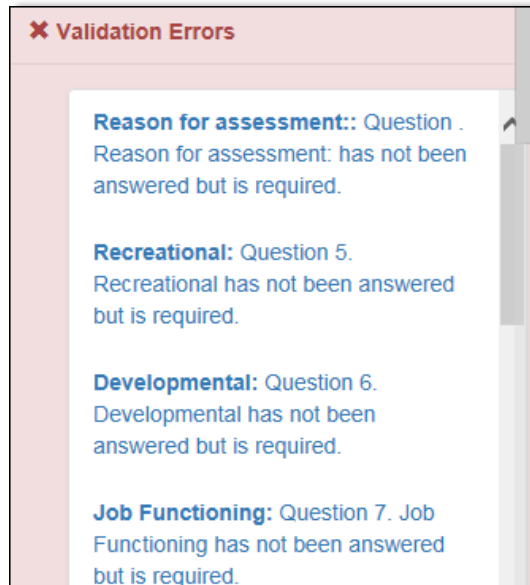
2. **To complete required items, click an item showing in the Validation Error box to move the screen to that section of the assessment, and then click the paper and pencil icon located at the top, right corner of that section.**
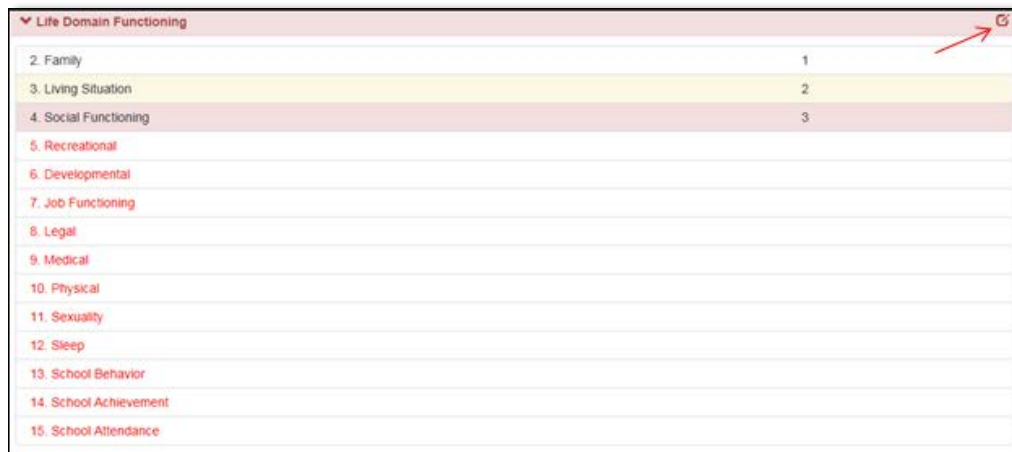
3. **The section will open allowing for item completion.**
    - Notice that the Validation Error box has minimized to the right side of the screen. After entering missing scores, click the arrow located around the middle of the Validation Error bar

(see the red arrow that is pointing to the left, below) to open the Validation Error box to select the next section/item that must be completed.

- Enter all missing scores and then click Save.

4. **Click Submit to submit the assessment to your supervisor for approval.**
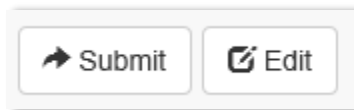
Accessing an Assessment

1. **From the Clients List on the Menu Bar, select the client.**
   - Remember you can sort and/or filter the client results to help you find a specific client.

2. **Once you find the client you are looking for, click on the row where the client's information appears.**

   - After selecting a client you will navigate to that client's Assessments screen. If the client has assessments entered into OA for him/her, there will be a list of those assessments. When a client is open to your program RU, you are allowed to see all of the client's assessments, even those created in programs and agencies that you are not assigned to. This screen will show all of these assessments. If there are no assessments in the system for the client, the screen will be blank and state "No data found!" (see below).

- The list of assessments, if any, can be sorted and/or filtered.

3. **Once the correct assessment is located, click the row where the assessment information appears.**

- The assessment will open in the following format:

- Depending upon the assessment status (assigned, submitted or approved) and your permission levels, from this screen, you may be able to review, edit, submit, print, submit or delete the assessment. You can also access the other functions on the toolbar along the bottom of your screen.

- If an assessment has been approved, the header bar of the assessment will be green. Assessments in the assigned or submitted status will have a blue header.
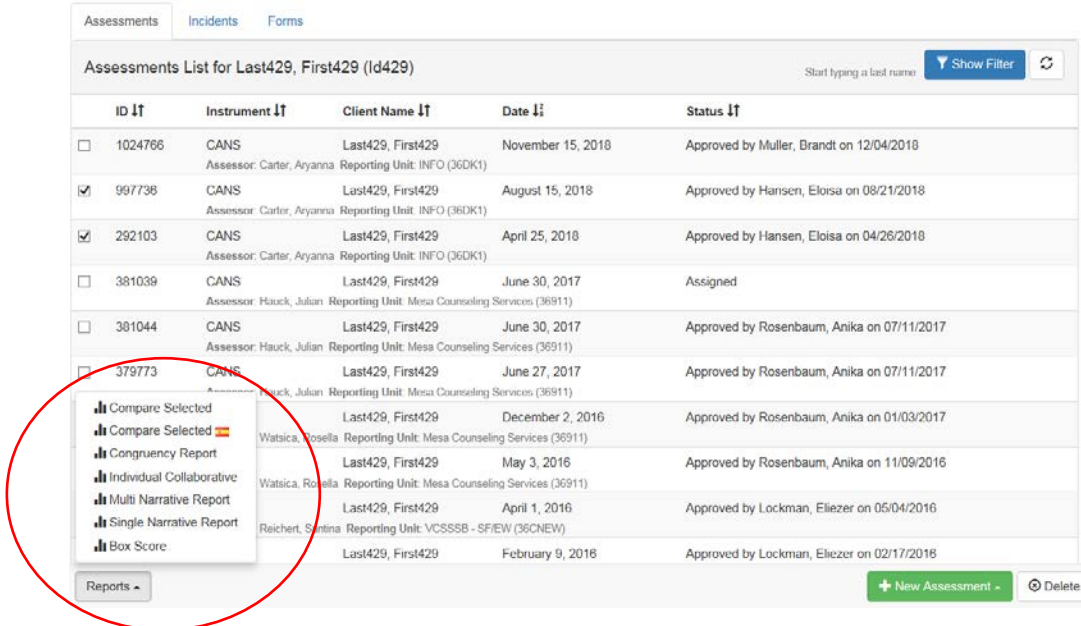
Creating Individual Assessment Reports

There are eight reports that can be generated for a client from the client's Assessment List screen that is based on the client's assessment data.
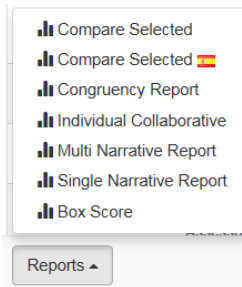
1. **Navigate to a client's Assessments List** *Please note: In order to access these reports, you must navigate to the assessment list via clicking on a specific client from the Clients List*.

2. **Select the report button on the bottom left of your screen to reveal the menu of report options.**

3. **Click the name of the desired report.**
- The report will open in a new window in your browser.

4. **For the <u>Compare Selected</u> report, select the assessments you would like to compare by clicking the checkbox to the left of each row. Up to five (5) assessments can be selected for comparison. You can also generate the report in Spanish by selecting the <u>Compare Selected</u> report with the Spanish flag icon next to it.**

The Compare Selected report is a side by side comparison of selected assessments to show changes to a client's items' scores over time.

Algorithms Classifications			
CANS Core Needs Actionable Items	(10.0)	(3.0)	(11.0)

Last429, First429
Client ID: 429
Date of Birth: 09/28/2001

#	Question	Approved Carter,Aryanna 04-25-2018 36DK1 CANS	Approved Carter,Aryanna 08-15-2018 36DK1 CANS	Approved Carter,Aryanna 11-15-2018 36DK1 CANS
Assessment Information				
	Reason for Assessment:	Initial	Update	Update
	If reason for assessment is Major Life Event, Describe:			
Caregiver Section(s)				
1	Caregiver section(s) does not apply at this time			
Life Domain Functioning				
2	Family Functioning	2	1	2
3	Living Situation	2	1	2
4	Social Functioning	1	1	2
5	Recreational	2	1	2
6	Developmental/Intellectual	0	0	0
7	Job Functioning	NA	NA	1
8	Legal	2	2	2
9	Decision Making	2	2	2
10	Medical/Physical	0	1	0
11	Sexual Development	0	0	0
12	Sleep	0	0	1
13	School Behavior	2	2	1
14	School Achievement	1	1	1
15	School Attendance	1	0	1

5. **For the <u>Individual Collaborative</u> report, select two assessments by clicking the checkbox to the left of each assessment row.**

The Individual Collaborative report graphically represents a comparison of time one and time two (e.g. Initial versus Update) assessment scores.
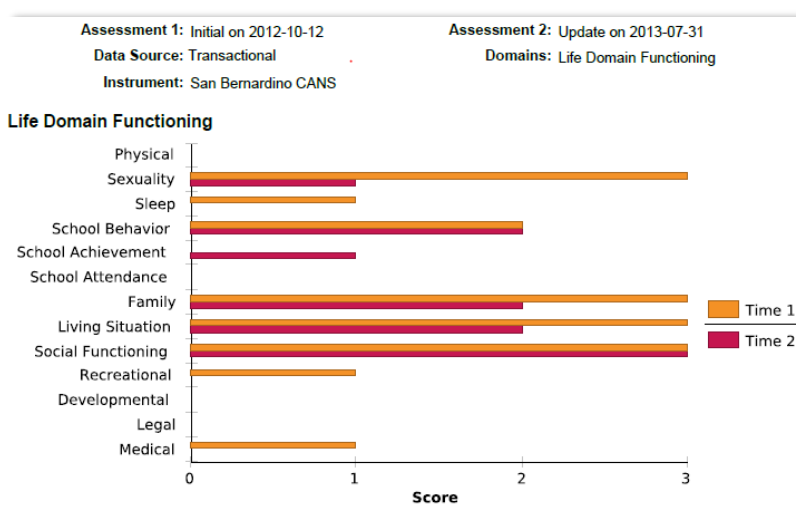
6. **For the <u>Congruency</u> report, select only two assessments by clicking the checkbox to the left of each row to generate this report.**

The Congruency Report displays the similarities between two CANS Assessments done within a time frame. The report gives a percentage of agreement on all the items, as well as those items with actionable needs. The purpose of this report is to create communication between different reporting units that are treating the same client.

CANS Congruency Report -- 29 Days Difference		
Child/Youth's Name: Last51459, First51459	**DOB:** Jun 15, 1963 **Age:** 55	**Identifier:** Id51459
Assessment ID:	1010728	1010735
Reporting Unit:	3691F7	3691F7
CANS Compared:	Aug 22, 2018	Sep 20, 2018
	Planned Discharge	Initial
Contact Information		
Assessor:	McClure, Katrina	McClure, Katrina
Email:	mustafa@nicolas.ca.cc85a.exar	mustafa@nicolas.ca.cc85a.example.cc
NOTE: All communications via email must be encrypted and password protected if Protected Health Information (PHI) is included.		
Congruency Scores		
Count of Actionable Core Needs	0	0
Percentage of Agreement on All Items	94% (67/71)	
Percentage of Agreement on Items Needing Action	99% (70/71)	
Priority Items to Reconcile		
No Priority Items to Reconcile.		
Priority Caregiver Items to Reconcile		
No Priority Caregiver Items to Reconcile.		
Additional Items Rated Both Actionable and Non-Actionable		
Residential Stability	0	2
Additional Items with Different Scores between Agencies		
Reason for Assessment:	Planned Discharge	Initial
Antisocial Behavior/Conduct	1	0
Danger To Self	0	1

7. **For the Narrative report, you do not have to select any assessments from the client's Assessment List. When this report is selected, a pop-up box will appear showing submitted and approved assessments organized by episode. From this pop-up box, you can select up to three assessments to compare.**

The Narrative Report was created to provide an efficient way to share CANS information with others. It is especially suited for review at Child and Family Team Meetings. These are some specific reasons to use the Narrative Report:

- Share within Child & Family Team Meeting to ensure good communication
- Share with Child & Family as the output of clinical assessment
- Share with Child & Family to show progress made on specific concerns
- Provide a copy to CFS Social Worker to ensure clear communication

Specific items may be hid at the clinician's discretion (e.g., substance abuse, sexuality).

Reports that contain PHI are often shared in Child & Family Team Meetings, and technically, anyone with whom you can share a copy may keep a copy. However, pragmatically, please use good clinical judgment regarding who keeps a copy of the Narrative Report.

Note: Within the report you can choose to include or exclude items from the Strengths Domain and any notes attached to the items. You can also select items that you do not want to appear on the printed report by clicking on the item once. When the item is clicked once, it will appear as "greyed out". Greyed out items will not be included in the printed version of the report. If you grey out the wrong item(s), just click the item(s) a second time to return to the black font color, and the item(s) will be included in the printed report.

8. **For the Treatment Progress Report, you must first click on the Forms tab located below the assessment timeline. From this tab you can view previously generated Treatment Progress Reports for this client. To generate a new Treatment Progress report, click on the New Form button and select "Treatment Progress Report."**
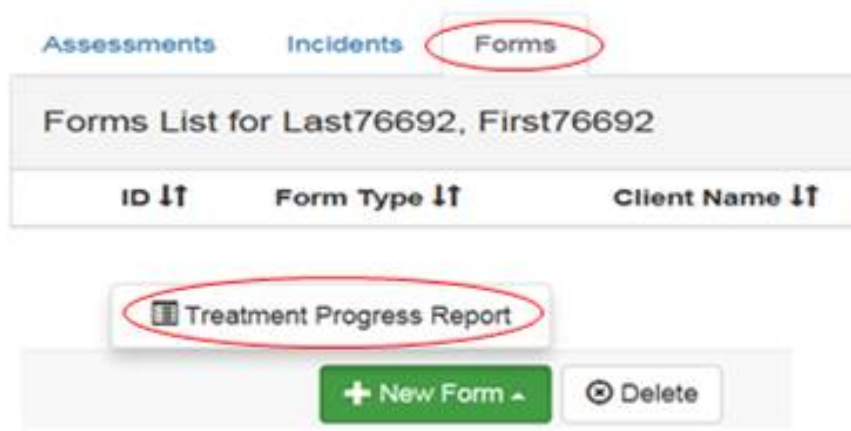
The Treatment Progress Report is useful when an agency is requesting information on how client treatment is progressing. The report includes items prepopulated from OA and SIMON, and allows for input by the clinician via open text and dropdown bars. In creating these reports, it is important that the clinician remember the audience when selecting CANS items to be conveyed. Items in the report can be "hidden", so they are not seen in the printed report

Designating an ICC Coordinator

1. From the Home Screen, select Workload.

Workload
My Workload

2. Select (click) the client to add/edit an ICC Coordinator

3. Select the 'Contacts' tab.

4. Click the 'New External Contact' section located on the bottom right of the screen to add a new ICC Coordinator. Select 'ICC Coordinator'.

5. When providing information about the ICC Coordinator, you will be required to enter information for all fields except the "End Date". To choose an Organization, please select an option from the drop down menu that says 'Agency Name'. Once all the fields are entered, select the 'Add' button located on the bottom right of that window.

6. The new ICC Coordinator has now been added. To edit the ICC Coordinator, click the square button next to the 'X'. To remove an ICC Coordinator, click the 'X' in that section.

| Assessments | Incidents | Forms | Contacts |

ICC Coordinator

First123456 Last654321

Effective Date Start: **April 19, 2019**   Effective Date End: **Contact is Active**   ☑ ✖
Email: **testemail@gmail.com**   Phone Number: **(123) 455-6777**
Agency/Organization: **Test Report Unit**

Assessment Approval (A task for Supervisors and Clinical Administrators Only)

1. **From the Data Portal Toolbar, click the Assessments option from the top Menu Bar and select Approve from the drop-down menu.**

Home (Training)   Clients ▾   Assessments ▾   Item Lists ▾   Reports   ❷ Help   👤 Last1760, First1760   Logout

List
Clients List   Approve
   My in progress
   My returned

Identifier ⬍   Date of birth ⬍

Start typing a last name   ▼ Show Filter   ⟳

2. **A list of submitted Assessments will display.**
   - This list is sortable by ID number, Instrument, Client Name, Date, or Status of assessment.

Home (Training)   Clients ▾   Assessments ▾   Item Lists ▾   Reports   ❷ Help   👤 Last1760, First1760   Logout

Assessments in need of approval   ▼ Show Filter   ⟳

	ID ⬍	Instrument ⬍	Client Name ⬍	Date ⬍	Status ⬍
☐	364888	CANS	Last4780, First4780	April 30, 2012	Submitted
		Assessor: Last307, First307 Reporting Unit:			
☐	400687	CANS	Last4507, First4507	August 14, 2012	Submitted
		Assessor: Last299, First299 Reporting Unit:			
☐	363475	CANS	Last6782, First6782	August 24, 2012	Submitted
		Assessor: Last257, First257 Reporting Unit:			
☐	363730	CANS	Last4871, First4871	September 14, 2012	Submitted
		Assessor: Last307, First307 Reporting Unit:			

There are three ways you can choose to approve assessments from this screen. One way is to open the assessment by clicking on the assessment row, then approve. The second way is to approve using the Sequential Approve button. The third way is to approve using the Batch Approve button. The Sequential and Batch Approve methods are covered below.

- As you approve, you can refresh the list periodically by clicking ⟳ icon located to the right of the Show Filter button, to see if any other assessments have arrived for approval**.**

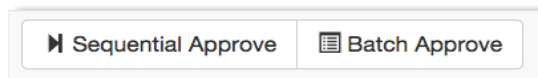3. **The assessments to be approved can be filtered by using the Show Filter button.**

- The Sequential and Batch Approve options are similar approval processes, but offer slightly different assessment form views. Both can be accessed via the toolbar at the bottom, right of the screen.
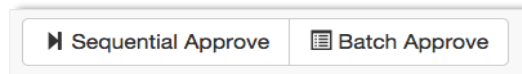
Sequential Approve

1. **Click the Sequential Approve button at the lower right of the screen to access Assessments in need of approval.**

- The first assessment in the list of assessments will open in the format below:

- From here you can approve or reject each listed assessment on a rolling basis. For example, once approve/reject the first assessment, the second assessment in the list opens for you to approve/reject, then the third, and so on. In this view, you can also Edit before approving, if necessary.

Batch Approve

1. **Click the Batch Approve button at the lower right of the screen to access Assessments in need of approval.**

- In this view, to the left of the screen is a panel of the assessments that need approval.

- To the right of the screen will display the first CANS-SB/ANSA-SB score sheet that needs approval. Notice that this assessment format is much like the CANS-SB/ANSA-SB hardcopy score sheet.

- You will be able to approve/reject the assessment and move to the next assessment automatically, like in Sequential Approval.

- In Batch Approval mode, you are NOT able to edit the assessment before approving. If the assessments must be edited, you will need to exit Batch Approval mode.

For both processes, you will click the buttons (shown below) to either approve or reject the given assessment.

- After you approve the assessment, you will see a green confirmation box near the top right that says "Assessment successfully approved".
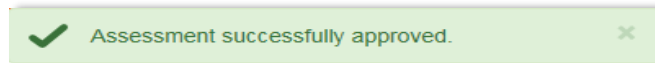

- If you choose to reject the assessment, you will receive Reject Assessment Note box in which you must note why the assessment is being rejected. The rejected assessment will be sent back to the assessor's ToDo box.

2. **Once you have entered your reason, click reject to confirm the rejection. If necessary, click the "x" at the top right to cancel the Reject Note process. You cannot reject an assessment without submitting a reject note.**
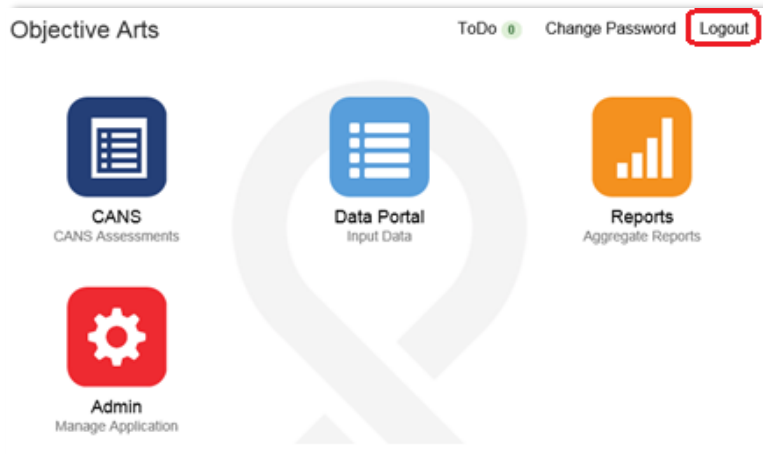
- Once you click reject, you will see a green confirmation box near the top right that says "Assessment successfully rejected".
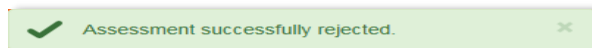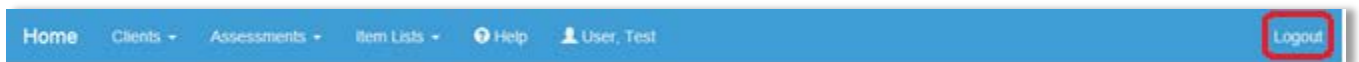
Logging Out

1. **To log out, click Logout at the top right of the screen.**

   From the Home screen: Click Logout.

   From all other screens (e.g. Administer Staff screen), click Logout.

   Close your browser after your OA session for security.

If you need further assistance, please contact your agency's Objective Arts Subject Matter Expert. Subject Matter Experts (SME) are ***technical experts*** in the Objective Arts program, for the agency. Program specific OA SME's will contact DBH directly with Objective Arts questions and issues beyond their scope of knowledge.